



COUNTY OF SAN DIEGO  
**Great Government Through the General Management System – Quality, Timeliness, Value**  
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

PROPERTY ASSESSMENT SPECIALIST I	Class No. 005511
PROPERTY ASSESSMENT SPECIALIST II	Class No. 005517
PROPERTY ASSESSMENT SPECIALIST III	Class No. 005518

---

■ CLASSIFICATION PURPOSE

To collect, verify, and classify data for property tax assessments; to analyze complex questions on reappraisals; and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

Property Assessment Specialist I:

This is the entry-level class in this series. Under direct supervision, this class performs paraprofessional work in real and personal property ownership and appraisal for taxation purposes. This class is distinguished from the next higher class, Property Assessment Specialist II, in that the latter independently applies laws and regulations to verify, prepare or correct property assessments.

Property Assessment Specialist II:

This is the journey-level class in this series. Under general supervision, this class is responsible for: applying appraisal techniques to determine simple valuations on property such as apartment house furnishings; determining property ownership and replacement cost factors; and updating appraisal data in the computer system. This class is distinguished from the next higher class, Property Assessment Specialist III, in that the latter performs the most complex appraiser support work and research for Assessment Appeals Board Hearings.

Property Assessment Specialist III:

This is the lead level class in this series. Under general supervision, this class is responsible for more complex property appraisals such as leased equipment, and mobile homes, or the most complex work on ownership reappraisal, fractional interest transfers and documentation for Assessment Appeals Board Hearings. This class differs from the next lower class, Property Assessment Specialist II, in that the latter assigns value to the most simple types of property and does not make appearances before the Assessment Appeals Board. This class differs from the Appraiser class in that there is an emphasis on data collection, property classification and record correction at the Specialist III level. Appraisal activity is restricted to the most routine appraisals of personal and real property.

■ FUNCTIONS

**The examples of functions listed in the class specification(s) are representative but not necessarily exhaustive or descriptive of any one position in the class(es). Management is not precluded from assigning other related functions not listed herein, if such functions are a logical assignment for the position.**

Essential Functions:

1. Responds to public inquiries, both in person and via phone, regarding appraisals, appraisal procedures and assessment laws, regular and supplemental tax bills, change of ownership, valuation problems and the operations of the Assessor's office.
2. Prepares correspondence notifying taxpayers of assessment changes or Assessment Appeals Board actions affecting them.
3. Updates field book by physically canvassing businesses to ascertain location, mailing address, ownership and type of business.
4. Utilizes computerized tracking and spreadsheet programs to assist appraisal staff with record searches and corrections on valuations, ownership and processing.
5. Dispenses information on leasing and business tax bills and business property statements.

6. Cancels bills and submits roll corrections at the direction of appraisal staff.
7. Conducts title research for change of ownership appraisals, and reviews records to determine occurrence of reappraisals.
8. Corrects multi-system computer records.
9. Tracks fractional transfers of ownership, and the opportunity for reappraisal.
10. Investigates calamity claims.
11. Performs mathematical calculations and uses tables to compute values and cost figures for apartment buildings, boats and personal property.
12. Codes complex structures for Computer Assisted Mass Appraisal.
13. Reviews appraisal calculations.
14. Determines use of proper roll values.
15. Reviews computerized record corrections for completeness and accuracy.
16. Traces property and establishes ownership through dock checks, correspondence, escrow and leasing documents
17. Provides courteous, high quality service to members of the public by personally responding to requests for service or appropriate referral.

Property Assessment Specialist III (in addition to above):

1. Checks Appeals Board actions and roll corrections for technical accuracy.
2. Analyzes the most complex changes of ownership and reappraisal.
3. Reviews supporting documents to verify fractional interest transfers and assessed value calculations.
4. Initiates Assessment Board action to resolve problems.
5. Acts as specialist on the Revenue and Taxation and Property Tax provisions in their assigned specialization or area of work.
6. Provides testimony at Appeals Board Meeting on change of ownership issues.
7. Performs the most complex research of appraisal staff.
8. Provides technical guidance to subordinate Property Assessment Specialist classes.
9. Calculates property bills and corrects computer system records, schedules, processes and distributes monthly, quarterly, and annual data sales.
10. Prepares quarterly and annual State Board of Equalization reports.
11. Maintains security access to ARCC Local Area Network (LAN) and maintains information regarding all ARCC computers including make and model, condition and related factors.

■ KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of:

The following apply to all classes:

- Basic principles and methods used in making estimates of value.
- California Revenue and Taxation Code as it relates to property assessment and the appraisal of real, business, and personal property.
- Procedures and methods used to determine if assessment values are correct or to cancel property tax assessment.
- Business and economic terminology.
- Recent laws affecting property assessment.
- Telephone, office, and online etiquette.
- County customer service objectives and strategies.

Property Assessment Specialist III (in addition to the above):

- Principles of lead work.

Skills and Abilities to:

- Note and measure real property.
- Utilize computerized spreadsheets and word processing software.
- Communicate effectively, both orally and in writing.
- Perform statistical and complex fractional interest and assessed value calculations.
- Review, understand and interpret applicable legal documents.
- Proofread and check information for completeness and technical accuracy.
- Read and interpret blueprints, maps, property descriptions, leases, deeds and legal documents.
- Apply laws and procedures in the correction of property tax assessments.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in challenging situations that require a high degree of sensitivity, tact and diplomacy.
- Provide prompt, efficient and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.

Property Assessment Specialist III (in addition to the above):

- Lead, plan and coordinate the work of staff.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. Examples of qualifying education/experience are:

Property Assessment Specialist I:

1. A certificate from the Office of Real Estate Appraisers (OREA), OR
2. A Regional Occupational Certificate (ROP) for Real Estate, OR
3. Thirty (30) units of course work toward a college degree from an accredited college or university, OR
4. One (1) year of experience in real estate appraisal, personal property appraisal, real estate sales, or building contracting; and at least fifteen (15) units of college-level course work as described above, OR
5. Three (3) years of clerical experience in an Assessor's Office, with responsibilities that include processing deeds, institutional exemptions, leases, or other property documents relevant to change of ownership.

Property Assessment Specialist II:

1. Sixty (60) units of course work toward a college degree from an accredited college or university, OR
2. One (1) year of experience as a Property Assessment Specialist I in the County of San Diego, or an equivalent class in another California County Assessor's Office, OR
3. Five (5) years of clerical experience in an Assessor's Office, with responsibilities that included processing deeds, institutional exemptions, leases, or other property documents relevant to change of ownership.

Property Assessment Specialist III:

1. One (1) year as a Property Assessment Specialist II in the County of San Diego or equivalent classification.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

**The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification(s). Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.**

Continuous upward and downward movement of the neck. Frequent: sitting, repetitive use of hands to operate computers, printers and copiers. Occasional: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, simple grasping, reaching above and below shoulder level. Some positions may require the ability to perform moderate lifting up to 20 lbs.

## ■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

### License

In some positions, a valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own vehicle.

### Certification/Registration

Some positions in the Property Assessment Specialist II and III classes require applicants to have or obtain a permanent Appraiser's certificate issued by the California State Board of Equalization within one (1) year of appointment.

### Working Conditions

Office environment; exposure to computer screens.

### Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

### Probationary Period

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

**New: December 15, 1989**

**Revised: May 20, 2003**

**Revised: April 19, 2004**

---

Property Assessment Specialist I (Class. No. 005511)  
Property Assessment Specialist II (Class. No. 005517)  
Property Assessment Specialist III (Class. No. 005518)

Union Code: AE  
Union Code: AE  
Union Code: AE

Variable Entry: Y  
Variable Entry: Y  
Variable Entry: Y